Virginia Information Technologies Agency

Data Management Program Quarterly Update

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Virginia Information Technologies Agency

Agenda

- Update on Data Standards Initiatives
  - Procurement
  - Human Resources
  - Enterprise Project Work (FM, PB and CSI)

- Update on Managing Data Standards

- Next Steps

Developing Data Standards

Enterprise Initiatives

Vendor Data Standard

WHO

- **Community of Interest (COI)**
  - Division of Purchases & Supply (DPS)
  - DOA
  - VITA SCM

- **Agency Leads**
  - Jan Fatouros – DPS
    - Bob Sievert, Data Steward
    - Becky Barnett
  - Kim White – DOA Data Steward
    - Randy McCabe
  - Susan Woolley – VITA SCM

- **Subject Matter Experts (SMEs)**
  - Bryan Wagner – DGS Finance
  - Dana Smith – VITA Finance
  - Cynthia Parker – VDOT Finance
  - Patti Higgins - Tax
  - Martha Laster – DOA-Payroll
  - Norma Roberts – DOA A/P

- **Enterprise Data Architect**
  - John Morgan - EAD

WHAT

Scope of Vendor Data Standard

- Defines vendor data that is required to support the purchase and payment of good and services pursuant to the Code of Virginia.

- The data standard includes the mandatory data requirements for information collected about vendors.

- This standard applies to all agencies and institutions.

- A vendor is defined as an individual, public body, or business who desires to sell goods or services to the Commonwealth.

Metrics
- 19 data entities
- 196 data attributes
- 22 relationships between entities

Vendor Data Standard

HOW

- **Data Standardization Process (Phase 1-2)**
  - Collected data requirements
  - Researched topics
    - Federal & state requirements
    - Commerce standards (XML)
  - Drafted a data model
  - Reviewed model with SMEs
  - Refined model based on feedback
  - Reviewed with Enterprise Data Architect

- **Phase 3 – Formal Review (10-09)**
  - Finalizing COI feedback
  - Discussing VITA review process

- **Phase 4 – Resolve Comments**
  - EAD will work with COI to resolve comments

- **Phase 5 - Approvals**
  - Discussing VITA approval process

EFFORT

- **DPS Lead – Jan Fatouros**
  - 408 hours from January – June 2009

- **EAD Data Architect**
  - 120 hours from May – July 2009

- **5 Review Sessions with SMEs**
  - 100 hours combined effort

- **Since July 2009 – COI Review**

WHEN

- Short term implementation plan around Vendor Name (eVA & CARS)

- 2010 implementation plan to meet SB936 mandate (eVA & CARS)

- Data Standard for adoption in November 2009 which is the "to-be" plan (eVA & new FM)

Next Steps – Vendor Standard

- Meeting October 26th with Vendor COI to finalize narrative for standard.
- Put standard out for comment on the Online Review and Commenting Application (ORCA) for 30 days.
  - Have DOA and DPS contact their business communities to solicit feedback on standard
- Resolve feedback
- Submit data standard for approval – November target

Order to Pay Data Standard

- *Data required for purchase transactions – John Morgan (EAD) capturing requirements from Bob Sievert (DGS)*
  - Contracts
  - Requisitions
  - Purchase orders
  - Receipts

- *Data required for fiscal transactions – John Morgan (EAD) capturing requirements from Kim White (DOA)*
  - Invoices
  - Vouchers
  - Payments

- *COI – DPS, VITA SCM and DOA*

- *Data Model is in draft. Jan Fatouros working on DGS aspects of the model*

- *Target timeframe – December 1, 2009*

HR Data Standards

- VITA has committed resources to define and develop a PMIS data exchange.
  - Map PMIS HR transactions to PeopleSoft transactions (supporting VCCS Project and potentially VDOT work)
  - Define the data, relationships and business rules for a data exchange – version 1 of an HR data standard
  - Review analysis with DHRM resources and other interested agencies
  - Project charter and plan under development
  - Resources Assigned
    - Kim Martin, Project Manager
    - Tina Weston, Data Analyst/Modeler
    - VCCS, VITA, and other SMEs to define/review requirements
    - VITA developers - TBD

FM Data Standards

- Chart of Accounts (COA)
  - A work group will be convened to drill down on defining the chart
  - Work group members and timeframes to be determined by VDOT/DOA project team. DPB will participate in this effort.
  - Meeting scheduled for October 21st to review next steps for COA work

- Enterprise Data Exchanges
  - Work with the VDOT/DOA project team to review the planned enterprise data exchanges.

PB Data Standards

- Participating in the COA efforts
- Review planned data exchanges for project
- Meeting with DPB this week or next to do some planning.

CSI Project - DMV

- CSI has recently restructured some of their project work.

- To discuss next steps with lead data architect this week.

- Plan to continue our analysis on DMV's planned/future data exchanges

Managing Data Standards

Approving, Enhancing and Exceptions

Catalog and Processes Drafted

- Data Standards Catalog – a place to store the COV data standards (In Draft, In Review, Approved)
  - *Data Management Website http://www.vita.virginia.gov/oversight/default.aspx?id=10338*

- Internal vs. External Data Standards

- Support Processes Defined
  - *Approval Process*
  - *Exception Process*
  - *Adding New or Enhancing Existing Standards*

- Launching with the Data Management website - Data Standardization Process Final version 1.0

Next Steps

- Take two standards in draft and gain ITIB approval by year end
- Finalize approval and exception process with CAO, CIO, and ITIB
- Continue work on initiatives for HR, FM and PB – target deliverables TBD

Next Quarterly Meeting

January 12, 2010